

Beth Morris Weiss. Collaborative Educational Programs for Grades 6-12:  
A Study of Partnerships between Special Collection Librarians and Educators. A  
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This paper considers how collaborative educational programs for using primary source materials are initiated and sustained between special collections librarians and school groups of young adults in grades 6-12. In particular, this study focused on on-going programs that met more than once where students used primary sources. Semi-structured interviews with three teachers, a school media specialist, a museum historian, a state librarian, and two public librarians were conducted to identify effective practices of four such collaborations conducted between 2009 and 2017: *Brooklyn Connections*, the Bangor, Maine *Life on a Tidal River* online exhibits, a *Daily Record* transcription project in Wilmington, North Carolina, and the *R.O.A.D. Project* in Indianapolis, Indiana. Findings point to common factors for successful programs including accessible and interesting primary sources, providing students time for meaningful research, delivering help from experts, providing customized content, proficiency working with middle or high school students, and nurturing relationships for partnerships.

Headings:

Archives – outreach services

Community partnerships

Library outreach programs

Middle school

Primary sources

Library special collections

COLLABORATIVE EDUCATIONAL PROGRAMS FOR GRADES 6-12:  
A STUDY OF PARTNERSHIPS BETWEEN SPECIAL COLLECTION LIBRARIANS  
AND EDUCATORS

by  
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## **I. INTRODUCTION**

Outreach efforts connect archives to their local communities. Educational programs are organized by archives or libraries, museums, or historical societies with archival collections to introduce local students to academically relevant original photographs and or documents held in special collections and facsimiles of primary sources that can aid student research. In other instances, archives or libraries are sought as partners by school groups eager to provide context for and improve results of their students' search for historical records. Collaborative educational programs unite archivists, librarians, museum or historical society staff with teachers in order to organize and plan the most effective activities for students to compare original sources for historical research.

Educational programs are defined in this paper as meetings between students, their teachers, and a librarian, archivist, or museum staff member that include one or more activities to learn about a pre-selected topic. A collaboration is defined in this paper as any level of partnership between an archive or a library or a museum and a school group for planning an educational program, with the recognition that planning can run the spectrum from reserving dates to co-selecting primary sources to be included. Outreach is defined in this paper as all work by an archival professional to connect with school age users and their instructors and or families and or other community groups.

Undertaking efforts to reach patrons who otherwise would not be visiting a special collections reading room, and maintaining this outreach has grown into an

expected role for many archivists and special collections librarians. Along with the increasing numbers of outreach archivists serving at larger institutions in the field, there are now also examples of the practice of connecting with younger potential archives patrons via visits to elementary, middle, or high schools, or at public programs at archives or public libraries, or hosting them at the archive for an introduction to original documents.

Teaching middle school and high school students with primary sources has been a requirement of state and national history curriculum standards since the 1990s. The past two decades have seen an increase in resources in the fields of historical research, education, and library and archival education to fulfill an opportunity to help educators meet these requirements. Three activities by or connected with the Society of American Archivists (SAA) represent an increase in related professional development. For example, the Reference, Access, and Outreach Section of SAA formed the Teaching with/about Primary Sources committee in 2010. Likewise, there have been two Teaching with Primary Sources Unconferences held to coincide with the annual meeting of SAA in 2016 and 2017. In addition, a number of publications and professional development opportunities market the skills needed as an archivist to teach with primary sources including *Teaching With Primary Sources*, part of the 2017 SAA series Trends in Archives Practice.

Studies have evaluated how elementary, middle, and or high school students use primary sources as part of their school curriculum. Historians and educators of teachers both cite the role of using original documents in establishing empathy and as a way to compare multiple versions of historical events, both to make meaning and as a method of

corroboration. Archival literacy is a distinct category of information literacy and draws upon both skills for historical research and critical thinking, and has begun to be defined for the archival profession. The concurrent need for artifactual literacy has also been recognized for both teachers and students learning how to work with primary sources. By detailing and establishing a working definition of needed skills to research with primary sources, researchers can begin to make assessments of how a beginner level of archival literacy develops from research using primary sources from special collections.

Archivists and librarians managing archival special collections have in some instances partnered with local teachers and students to meet more than once for the purposes of an educational program where students are introduced to or complete research using primary sources. Each side of a collaboration is trying to meet distinct and overlapping goals, presumably in particular to increase archival literacy with activities that meet learners' needs and interests.

A majority of collaborations taking place are between archivists at universities and undergraduate students. There have been collaborations between archivists and undergraduate faculty and students, including recent examples at the University of North Carolina at Greensboro, NC, to deliver archival skills training in public high schools and at Kennesaw State University in Georgia to introduce a campus archive over multiple sessions to an undergraduate history class (JoyEllen Freeman, personal correspondence, November 10, 2017). A college campus setting is also implied in many portions of the *Teaching With Primary Sources* Module 10, and *Teaching with Archives: A Guide for Archivists, Librarians, and Educators*. The guide also implies that archivists can and will host students at their collection. Partnerships between archivists or librarians and

secondary educators can be rare, as can be the situation where special collections staff travel to students in middle school or high school.

I want to expand the conversation about archives and libraries' collaborations with teachers and their students by identifying effective practices of four collaborations between 2009 and 2017 for students in grades 6-12. One collaboration originated with the state's historical society inviting schools to collaborate with community partners including a public library's local history and special collections librarian. Another collaboration was made possible by grant funding that brought teachers in a major metropolitan area a way to bring local history special collections from the public library into their classrooms. A third program was organized by a school media specialist working with a state library and historical society, and the fourth program brought together university faculty, middle school students and their teachers to transcribe the content of a primary source at a museum.

Are there common factors for the success of these collaborative educational programs where secondary students use primary sources, even as they originate under different circumstances, and even as they originate and are facilitated via different people including special collection librarians, school librarians, and teachers? How do facilitators, both at institutions with archival collections and teachers of grades 6-12, evaluate challenges to a collaboration's initiation, maintenance, or conclusion? By analyzing facilitators' descriptions of collaborations that provide students opportunities to meet multiple times with special collections staff to work with them and the primary sources they can provide, archivists and librarians can continue to strengthen outreach practices and expand access for their communities' youngest researchers.



## **II. RESEARCH QUESTIONS**

1. How are collaborative programs between special collections librarians or staff of other similar institutions and school groups of young adults initiated and sustained?
2. What are the challenges and barriers to collaborative programs between teachers of grades 6-12 and staff of an archival collection at a library, historical society, or a museum?

### III. LITERATURE REVIEW

#### Archivists and Librarians' Roles as Educators

The past twenty years have seen more opportunities for archivists and librarians managing special collections to educate students directly about primary source materials. From teaching undergraduate students skills to evaluate primary sources, to hosting local school groups at an archival collection to introduce them to primary sources, to visiting local schools to make presentations, educational outreach is seen as a priority by many archival professionals for increasing awareness of an institution's resources and establishing and maintaining relationships that pave the way for reaching wider audiences. (Gilliland-Swetland, Kafai, and Landis, 1998; Hendry, 2007; Carini, 2009).

Robyns (2001) envisions archivists as "guides who are uniquely qualified to teach those unfamiliar with primary sources how to use, judge, and evaluate these materials for themselves" (as cited in Carini, 2009, p. 49).

...The time has come for proactive archivists involved in educational outreach to move beyond showing students how to find and access information in archives and toward greater instruction in critical interpretation and analysis of that information... Archivists must join with faculty as partners in building the foundation that will support the growth of 'independent learners.' (Robyns, 2001, p. 365)

While Robyns is writing about undergraduate collaborations and specifies that "the mandate exists for archivists in higher education" (p. 383), Carini extends the role to instructing learners in middle and high school, citing a continuing conversation following the session "Archivists as Educators: Why Should We Teach" at the 2008 SAA meeting. There was agreement "that archivists need training and strategies to address almost all aspects of their roles as members of the educational team within secondary and higher education" (Carini, 2009, p. 47).

### **Absence of Studies of Primary Source Use in Archives by 6<sup>th</sup>-12<sup>th</sup> Graders**

In 1998, Gilliland-Swetland reported that respondents to a 1996 survey of Los Angeles repositories and health science repositories elsewhere in the United States never mentioned students in grades K-12 as potential users “when asked which user groups they would like to see using their collections more often,” although “many respondents chose not to answer this question at all” (p. 149). Similarly, Cook writes about Canadian archives in 1997 that “a huge, and largely ignored, clientele for public programming - one of its prime ‘publics’ to be targeted- is that of middle and high school students studying Canadian history and culture” (p. 106). Few studies have researched K-12 programs with archives or library special collections. As of 1998, Gilliland-Swetland writes that “no studies indicate the level or nature of any use of archival materials by K-12 teachers or their students”, hypothesizing that this audience isn’t considered as pertinent users of archives to “academic archivists and educators” typically conducting such research (p. 145).

The lack of studies was also cited by Theunissen, a curator of an academic library map collection in Maine who observed that “standing room only” attendance at a 2003 presentation on integrating historical maps into K-12 outreach at the twentieth International Conference on the History of Cartography (ICHC) assured a repeat presentation for the next ICHC meeting in 2005, demonstrating both the rarity of and demand for the topic.

### **Evaluating Primary Source Use in Classrooms by 6<sup>th</sup>-12<sup>th</sup> Graders**

The role of digitized primary sources in how students in grades 6-12 are able to study history has been studied perhaps more so than the use of non-digitized archival materials. In one such study, Tally and Goldenberg, in agreement with Barton and other authors who emphasize the need for students' to have some form of attachment to or pre-existing interest in or knowledge of a topic to be engaged in the learning activity, cite studies showing "that if primary source documents are going to significantly enhance students' understanding of content, students need to be both cognitively active and emotionally engaged when working with them" (Tally and Goldenberg, 2005, p. 1). Their study had students choose a historical photo, map, or cartoon to analyze from the late 1890s or early 1900s in a group pre-selected from the Library of Congress' *American Memory* website. Behaviors were recognized as novice or expert if demonstrating "observation, sourcing, inferencing, evidence citation, question posing, or corroboration", criteria derived from the work of Sam Wineburg, "a cognitive psychologist who specializes in history teaching and learning" (Tally and Goldenberg 2005, 2, 6, 17).

Gilliland-Swetland, Kafai, and Landis' 1999 case study examined two elementary teachers' concepts of primary sources and opinions on using primary sources as the basis for a series of classroom activities and field trips. The participating fourth and fifth grade students were also asked to "describe what it was like to use old source materials" (p. 90). Garcia (2017) focuses on the skill sets K-12 teachers use to select primary sources and the interconnection between primary sources and inquiry-based learning.

## **Archival Literacy and Evaluating Sources as Evidence**

Carini points to Pugh's 2005 assertion "that it is the responsibility of archivists to use their collections to reinforce a set of archival research competencies" (as cited in Carini, 2009, p. 44). The goal of teaching students how to work with primary sources has been framed in terms of information literacy for primary sources, archival literacy, and archival intelligence (Yakel and Torres, 2003, and Carini, 2009). Yakel and Torres write in 2003 about the skills needed by researchers for what they term archival intelligence, or "user expertise in archival research," in an effort to codify what can be considered archival literacy, and how it is its own distinct subset of information literacy.

Carini (2009) outlines the major areas of agreement between literature on historical research and critical thinking, when he emphasizes that "Robyns [(2001)] notes that primary sources provide a unique opportunity for archivists to teach students about evidence, the authentication of that evidence, provenance, and the importance of context" (as cited in Carini, 2009, p. 44). Likewise, Yakel (2004) writes, "In the educational literature, the use of primary sources is a means of teaching writing, abstraction and the weighing of evidence" (p. 62) in her call for a set of criteria for educating researchers on how to use archival materials.

Stripling (2011) evaluated how primary sources and historical fiction contribute to establishing historical or cognitive empathy and emotive empathy for 8<sup>th</sup> graders. "Librarians need to mediate the use of primary sources to enable students to develop meaning and empathy by providing access to context, conflicting multiple perspectives, and evidence" (Stripling, 2011 pp. 94-95). Citing Wineburg's (1999, 2001) commentary on the mushrooming availability of and emphases on teaching history with primary

sources, Stripling writes, “Students now have the opportunity to ‘think like an historian,’ but they have to be taught the skills to do so” (as cited in Stripling, 2011, p. 5). The opportunity to compare several original documents or facsimiles thereof, allows for evaluation of the evidence demonstrated by the sources students are working with. “Stated as a heuristic, corroboration could be formulated as ‘Whenever possible, check important details against each other before accepting them as plausible or likely.’” (Wineburg, 1991, p. 77)

Archival literacy is a potential skill for all users, whether archivists themselves or the teachers and students they serve. Gilliland-Swetland’s (1998) definitions expand this literacy to encompass the recognition of the value of historical records and the accompanying evaluation of a source’s origins and subsequent history.

Archival literacy relates to users’ consciousness of their documentary heritage and the role that records play in establishing and protecting their rights and in recording and communicating their heritage. Archival literacy also relates to users’ abilities to apply evidence-seeking as well as information-seeking skills. These skills include the ability to consider individual documents in the context of record aggregates, make sense out of unsynthesized or unredacted material, consider the circumstances of the document’s creation (i.e., asking *who*, *what*, *when*, *why*, *where*, and *how*), analyze the document’s form and nature, determine whether it is an original and which version, and understand its chain of custody. (as cited in Gilliland-Swetland et al, 1999, pp. 92-93)

Carini (2009) agrees that “when using primary sources, context is a much more complex matter and involves understanding how other primary source documents and materials relate to the pieces being used” (p. 47).

Professor of Teacher Education Keith C. Barton writes to dispel myths of teaching with primary sources, including the myth that “using primary sources engages students in authentic historical inquiry” (Barton 2005, 748). Barton disagrees that having students conduct analysis of a single document or use a pre-selected group of primary

sources to answer questions helps them work as historians conducting research would.

“Historians ask questions about the past, and they seek evidence that will help answer those questions. They select the evidence themselves, and they do so precisely because of its authorship and purpose.” (Barton 2005, 749).

Barton does agree that “students’ ability to make sense of primary sources depends directly on their understanding of the context in which the documents were produced” (Barton 2005, 749). Barton disagrees, however, that a source can be defined as either primary or secondary without taking into consideration the context of a researcher’s inquiry, and proposes “original historical sources” as more apt and helpful (Barton 2005, 750).

Hendry and Garcia each analyze the role of inquiry-based learning and recognize how the practice of formulating one’s own inquiry puts the student in charge of the discovery, to make meaning, and establish relevance.

In education literature, this is known as ‘inquiry-based learning,’ an approach to teaching that emphasizes the process of discovery on the part of the student, rather than the straightforward transmission of knowledge from teacher to student... It encourages students to consider multiple perspectives, and most importantly, to think critically about the subject at hand. (Hendry, 2007, p. 117)

### **Teachers’ Artifactual Literacy and Priority of Establishing Context**

It is valuable as an archivist guiding teachers to recognize the combined skills needed by teachers when they are selecting primary sources to use in class. There are two intertwined roles when planning effective programs, that of researcher and that of teacher. Carini (2009) lists crucial aspects to consider when using a primary source as “evaluation of the physical artifact: paper quality, handwriting, ink, binding, etc., the importance of the audience, the formation of a narrative, which is supplied in secondary

source materials, date, and chronology” (p. 47). Yakel and Torres establish that “...Much more is needed beyond artifactual literacy to achieve true user expertise in archives, although artifactual literacy is an important component of information literacy for primary sources” (Yakel and Torres 2003, 61).

Cleary and Neumann recognize the two extremes of teachers who may skip teaching with documents because of their inherent complexities at the elementary or middle school levels or use documents in lessons without providing historical context. They cite Wineburg’s warning that “...Texts emerge as... social interactions set down on paper that can be understood only by reconstructing the social context in which they occurred” and recognize that “historians do not approach documents in isolation but as texts embossed in rich historical and historiographical contexts” (Cleary and Neumann 2009, pp. 74-75).

Cleary and Neumann, by citing the National Research Council’s 2000 publication *How People Learn: Brain, Mind, Experience, and School*, emphasize that effective teachers’ “knowledge of the discipline and their knowledge of pedagogy interact,” in terms of being able to provide needed historiographical context to help students answer relevant, critical questions (Cleary and Neumann 2009, 77). Pellecchia (2015) concludes how, “The demonstration that the act of contextualization is connected to textual analysis and the selection of nondominant perspectives promotes both historical thinking and critical literacy is significant” (p. 170).

Garcia (2017) assesses and defines the artifactual literacy of teachers when selecting primary sources made available by archives. She expands on this recognition of effective teachers’ multiple criteria for effective primary sources.



[Teachers] are concurrently evaluating a primary source based on its evidential *and* pedagogical value. As teachers undergo the process of interpreting primary sources and assessing their value as evidence, they are considering whether or not the primary sources offer the opportunity to model the interpretive process and whether the evidence provided by the primary sources sufficiently addresses an academic topic in a way that students can grasp and learn”. (p. 207)

Teachers want readily available materials that will captivate the interests of their students and represent compelling historical examples of subjects to be studied, and they balance these simultaneous needs.

### **Goals for Collaborative Educational Programs for Grades 6-12**

Carini (2009) writes that “the first, and most important concept that must be imparted is that archives exist and are there to be used” (p. 48) which is implied as a baseline for any outreach program.

A 1997 case study evaluated a series of related lessons on the field notes of biologist Donald Ryder Dickey for fourth and fifth grade students (Gilliland-Swetland, Kafai and Landis, 1999). The study analyzed students and teachers’ responses to researcher questions and also considered the effects of how archival materials are arranged, described, and accessed. “...A comparatively small amount of primary source material, *if appropriately selected, described, and contextualized*, can provide more than enough content for elementary-level classroom activities...” (Gilliland-Swetland et al. 1999, p. 111). While their study was of 4<sup>th</sup> and 5<sup>th</sup> graders, Gilliland-Swetland et al. found that “there is also likely to be an enhanced sense of personal connection with the content of the materials” if students are able to use original materials (Gilliland-Swetland et al. 1998, p. 95). In addition, elementary students needed to experience both the places

and activities whereby the biologists' archival materials were created as well as the place they were being preserved for maximum understanding (p. 111).

At the time of the study, there were few preceding studies that analyzed outreach partnerships.

What becomes apparent from review of the existing projects and studies is that there has been little systematic development and evaluation of robust archives and K-12 partnerships that integrate primary sources into K-12 activities in developmentally appropriate and pedagogically effective ways, that understand and address teacher needs and expectations, and that incorporate assessments of the relative merits of using originals, printed facsimiles, or digital copies of archival materials in the classroom. (Gilliland-Swetland et al., 1999, p. 96)

Because the lack of such studies has continued, there is a need for research focusing in particular on grades 6-12 and how practitioners are partnering with teachers to provide instruction for students on how to use original historical sources for research. Because, as Robyns (2001) writes, "Guided use of primary sources in education can have an empowering effect on students and can improve the quality of research in archives reading rooms" (p. 364).

## IV. METHODOLOGY

### Strategy and Design

The goal of this study was to analyze partnerships that involved collaboration between teachers and special collections staff and students using primary sources over multiple meetings. Existing categories of archivists' outreach and or primary source use by students in grades 6-12 were briefly analyzed as teacher education, student skills instruction, use of digital materials in the classroom, and extended work with students. National History Day activities were excluded from this study in favor of partnerships that developed to meet teachers' needs.

Semi-structured interviews were chosen to explore each project's context. Teachers were interviewed as well as special collections staff in order to analyze more than one side of each partnership.

### Sample and Sampling

The book *Archives Alive* (Schull 2015) was recommended as a potential source for candidates for the topic. Three apt candidates, all public librarians that met this study's criteria of collaboration over multiple meetings, were selected from the Educational Initiatives chapter. Only two of these three were able to participate, from Bangor, Maine and Brooklyn, New York. A fourth candidate, a school media specialist from Indianapolis, was identified after a literature search found an article on a middle school collaboration with a state historical society and state library. A fifth candidate, a museum historian from Wilmington, North Carolina, was identified through posts requesting suggestions made to listservs of the Society of American Archivists and the

Society of North Carolina Archivists. Due to time limits, the search was concluded in the fall of 2017.

Websites and or news coverage for the four projects were used to identify contact information for teachers who worked with the two public librarians and museum historian, and a state library staff member who had worked with the school media specialist. A total of eight people were able to be interviewed.

William S. Cohen Middle School's *Life on a Tidal River* project

The city historical society of Bangor, Maine initiated a community heritage project whereby local school librarians could work with students and teachers and other community partners. The historical society requested help digitizing materials that could also then be used to create online exhibits for the Maine Memory Network, the Maine Historical Society's website. The first exhibits were posted at the end of the 2009-2010 school year. One middle school was able to continue the project in its extension class on Maine studies offered as part of its curriculum.

The 2017-2018 school year marks the ninth year that online exhibits have been produced by seventh grade students from the school. A retired special collections librarian and a local historian work with a social studies teacher and school librarian to facilitate small group work over the course of an academic quarter. Potential topics are chosen according to the availability of primary sources and students vote on which topics to research. Online exhibits are written by the students, edited by the teacher and school librarian, and posted by the teacher and special collections librarian. A year-end celebration showcases the students' efforts for their families. The retired special

collections librarian (hereafter identified as ML to indicate Maine librarian) and social studies teacher (hereafter identified as MT to indicate Maine teacher) were interviewed.

Perry Meridian Middle School's *The R.O.A.D. I Travel* project

Teachers at an Indianapolis middle school approached the school media specialist in the summer of 2012 separately to brainstorm an alternate approach to a research project required as part of the language arts curriculum. The team then met with staff at the Indiana State Library to request their help and enlisted the state historical society as well. For the inaugural 2012-2013 school year, the project brought all eighth grade students to the state library to look at microfilm of newspapers published on their birth dates.

Supplemental content of introductory videos were also produced by the state librarians per the request of the school media specialist. An introduction to the microfilm machines was shown pre-visit and other segments about preserving family heirlooms, and the value of family stories, were used by the media specialist subsequent to the visit and ahead of students interviewing family members. The school media specialist (hereafter identified as IT to indicate she was a participant on the Indiana teacher side of the partnership) and one of the state librarians (hereafter identified as IL for Indiana librarian) were interviewed.

Williston Middle School 1898 *Daily Record* historical newspaper transcription project

A community group formed in fall 2016 to study and preserve the historical legacy of a formerly all African-American public middle school in Wilmington, NC.

One of the school's teachers designed a legacy project that included an application process whereby a small group of students from the school would complete a transcription project proposed by a university faculty member and their social studies teacher. A museum staff member attending the same community group meeting joined the project and facilitated sharing a facsimile of the museum's rare 1898 original issue of the *Daily Record* with the students. Their resulting transcription and the issue were digitized by the North Carolina Digital Heritage Center at the University of North Carolina Chapel Hill in summer 2017. The museum staff member (hereafter identified as NL to indicate a North Carolina participant with content expertise comparable to a special collections librarian) and the social studies teacher (hereafter identified as NT for North Carolina teacher) were interviewed.

#### Brooklyn Connections project at the Brooklyn Public Library

The Brooklyn Public Library (BPL) secured grant funding to establish Brooklyn Connections as a school outreach program. Teachers apply to be paired with a librarian who customizes student packets with archival materials and analysis questions based on the topic requested by the teachers. Popularity has increased and only public school teachers are eligible. Teachers new to the program are trained on selecting research topics with materials at the BPL's Brooklyn Collection. Staff teach students research skills over several class periods and the class is required to present a culminating project in May at the Brooklyn Public Library.

The program manager (hereafter identified as BL for Brooklyn librarian) was interviewed. A participating teacher (hereafter identified as BT for Brooklyn teacher)

whose positive recommendation of Brooklyn Connections was listed on the program's web page was contacted with assistance from BL and agreed to be interviewed.

### **Data Collection – Instruments and Procedures**

Semi-structured interviews were used to gather data from each facilitator of the program and, whenever possible, a teacher who collaborated with them. Each subject was contacted for permission to audio-record the interview so that it could be transcribed (Appendix 1). A baseline set of questions (Appendix 2) was provided ahead of time so interviewees could prepare any needed information for their reference during the interview. Probing questions were asked during each interview to follow up for clarification and to obtain additional pertinent content to describe how students used primary sources. Each interview transcription was analyzed for content relevant to the research questions. A list of themes was drafted. Quotations from the interviewees were highlighted and numbered if they matched a theme.

### **Significance**

While circumstances and scope can differ significantly between collaborative educational programs where students in grades 6-12 are introduced to or use primary sources for research, a research study of a sample of these such programs using semi-structured interviews can generate data to begin to fill a gap in evaluating how secondary school students and their teachers have successfully partnered with special collections professionals.

**Ethical Issues**

Permission to audio-record the interview and use results only for the purposes of the research paper were obtained from each interviewee. A numbering system was used so candidates were not identified by name. A list of interviewees and copies of our correspondence was password-protected. Initials were given to each interviewee to identify them in this paper's findings. A copy of the transcription will be provided via email to each interviewee.



## **V. FINDINGS**

### **Nine Common Factors of Success**

Nine common factors were cited by multiple interviewees as significant contributors to the success of a collaborative program, with success defined as positive student and or teacher feedback along with a repeat presentation of some or all of the program.

- Accessible primary sources of interest need to be selected according to the age, interests, and abilities of the students.
- Sufficient time is needed for meaningful research using primary and secondary sources.
- “Expert” help is needed and valued for locating and communicating the context of primary sources.
- Program facilitators must be able to deliver customized content for students and or teachers when requested.
- Teachers and librarians and any other community partners need to be committed to adding new tasks to accomplish the objectives of the program while maintaining flexibility when circumstances change.
- The ability to nurture, maintain, and sustain the relationships that can lead to partnerships is perhaps the most critical component as reflected in these interviews with eight partners from these four successful collaborations.
- Special collections staff need to have proficiency working with adolescents.

- For some student audiences, these programs may be the only opportunity to interact with original historical sources and the archival professionals caring for them.
- Critical thinking and inquiry-based learning are taught when researching with primary sources.

### **Accessible and Interesting Primary Sources**

Primary sources need to be selected according to the age, interests and abilities of the students so that they will want to research them. MT is a public school teacher of grade 7 social studies in Maine who has helped facilitate a project each quarter for the past nine years where students work with community partners to digitize primary sources and research local history topics to produce online exhibits.

You've gotta have buy-in from the kids. You're doing project work, as much choice as you can extend to the students especially around just that simple piece of selecting the topic area. Kids aren't going to get very excited you know, if they're not working on something that they're personally interested in. (MT, personal communication, February 3, 2018)

His co-facilitator is ML, a retired public librarian who worked as the Local History and Special Collections Librarian, who described students' interest and enthusiasm when analyzing historical photographs. "That's the real important thing when they start to, you know when kids get excited, that's really when they start, when I start learning... You can get 'em excited with stuff" (ML, personal communication, January 17, 2018). He chose primary and secondary sources that could enable the students to relate to the past.

Twelve, thirteen years old are kinda detached from the real world. Definitely detached from you know the 19th century world when we were doing the Civil

War. So one of the things I kinda did to attach them to it, there was a young boy... from Portland who joined the U.S. Navy at age 12... And at 13 he won the Congressional Medal of Honor. (ML, personal communication, January 17, 2018)

Likewise both interviewees met during the summer to generate possible topics for the coming school year's research by the students.

We'd come up with a list of things based on what materials they possibly had available and then the first step is brief the kids... and let them vote on what topics they want to focus on for that year because you want to make it as engaging as possible for the students. (MT, personal communication, February 3, 2018)

IT is a school media specialist whom teachers consulted when designing a new approach to research projects for eighth grade students, *The R.O.A.D. I Travel* (Research, Observe, Analyze, Discover). Her analysis led to the start of a teacher collaboration as well as a first-time community collaboration. Part of the year-long instruction for a culminating project was a field trip in the 2013-2014 school year for 330 eighth graders to look at microfilm of newspapers from their birthdate.

...[W]e were trying to get them also to think outside the scope of the now by realizing how quickly things changed and are different, and what the world looks like when they were born was so much different than the way it looks today... so the State Library visit would be to look at the newspapers. (IT, personal communication, January 17, 2018)

NT is a public school teacher of grade 8 language arts and social studies in North Carolina who brought a small group of students in Wilmington to the Cape Fear Museum, where they transcribed the text of a rare original 1898 issue of the *Daily Record* with details from the weeks preceding the Wilmington Massacre when white residents attacked and set fire to the newspaper's offices. "It was a terrible thing... I just think the fact that it's something that did happen right here made it so much more engaging for our students" (NT, personal communication, February 6, 2018). NL is a historian at a

regional history museum in Wilmington, NC who connected with teachers and university instructors through a community group at a local former African American high school.

One of the kids asked if he could read this article out loud and it was about the run up to 1898, where Manly was basically saying, ‘nobody's going to be stupid enough to attack the black community because we're so important to the region, but also just you know everybody wants to get along’. He was totally wrong, but... you could see the kids kind of, the hair on their necks stand up metaphorically speaking... (NL, personal communication, January 17, 2018)

### **Time for Meaningful Research**

Extending time for students to work with primary sources was accomplished in different ways in each program. Three of the interviewees, from two of the four programs reflected on the importance of more work time.

...[W]e thought we're going to come at this differently than we ever have before. We're going to take away the traditional... cramming it into those two or three weeks and bam they're done. And instead what we did was we spaced it out... And the kids, we have a success rate... the completion rate of the final project is higher with this project than are traditional projects. (IT, personal communication, January 17, 2018)

The Indiana students, in addition to a visit to the state library, also interviewed a family member of their choosing.

In North Carolina, students met outside of school for about an hour each week to transcribe the newspaper and do related activities such as a field trip to an African American cemetery. NL and NT appreciated the opportunities made possible by this amount of time.

Plus they spent... more time on this than they probably spend on most things that they do in school. So just that kind of deep drill down into a time frame seemed like it was really great... [H]aving an ongoing project too, people learn more when they go back to things... most of the evidence suggests that it's better to look at something more than once to kind of get it to stick so, doing that and having some time for reflection and then coming back together is really key. (NL, personal communication, January 17, 2018).

The students met each week with a faculty member from a local university along with a graduate research assistant, and the research process included time for asking questions and looking for answers.

...[W]e'd be reading an article and there would be something that we didn't understand. And maybe someone in the room could explain it and maybe not and then we would start to do the research and find out what it meant or what it connected to or who a certain person was. (NT, personal communication, February 6, 2018)

### **Help from Experts**

Interviewee comments showed expert help is wanted, needed, and valued by teachers for locating and communicating the context of primary sources, and for improving students' information literacy. Experts can help students both locate and understand primary sources to improve the results of their research. The experts in Wilmington, NC were the museum staff who hosted the students. "...I brought up the actual copies from our collection from the basement... And showed them how we had preserved them and kind of told them about... how the collection came to us..." (NL, personal communication, January 17, 2018).

[Alexander Manly] also had newspaper clippings from Philadelphia and New York where he had gone North when he was run out of town. So the museum gave us access to those and... it was really great to have those actual artifacts in front of us. (NT, personal communication, February 6, 2018)

Experts included the local professor and research assistant who began the project and helped two social studies teachers facilitate meetings at the Cape Fear Museum of a group of 12 students from two local schools.

Dr. [John] Sullivan brought them to a lot of ways to research and to find articles... [T]hey really built their research and critical thinking skills through it... [T]hose 12 students are definitely gonna go forward and have a leg up on those sorts of things on their peers who haven't done any kind of a project like

this... just the fact of exposing them to somebody like Dr. Sullivan, and Joel. People who spend their lives doing these things. (NT, personal communication, February 6, 2018)

IT described how having the students recognize a need for and experience expert assistance were objectives of the Indiana program.

...It's critical I think for this generation to realize that... not everybody's an expert on everything, and that we need to start seeking those field experts... And so that's where those videos came in so they could see that your librarian and your teacher are saying, 'We weren't the experts on this, we learned from them. And so this is what they can teach you.' (IT, personal communication, January 17, 2018)

BL is a librarian who helps manage the Brooklyn Connections program offered by the Brooklyn Public Library's Brooklyn Collection archives at no cost to local public school teachers and their students. The archivists' expertise is used to help train participating teachers on their own research skills before the academic year begins.

[A]ny new teacher who's never been a partner with us before is required to come to this training to get a really thorough and comprehensive overview of not just the program but also archival research because we found that another challenge we have is that teachers will sometimes assign their students a research topic... that doesn't have enough information on it or is too broad or too narrow. (BL, personal communication, January 24, 2018)

BT is a public middle school teacher of grades 6, 7, and 8 participating in Brooklyn Connections for her fifth consecutive year. She teaches in a self-contained (special education) classroom. Her students work with facsimiles of primary source photographs and documents as provided in custom packets from the Brooklyn Connections program from the Brooklyn Public Library. The ability to work together as co-teachers with the Brooklyn Connections is appreciated. "And you kind of are like a co-teacher where you parallel teach and support the researcher teacher in presenting the research to the students" (BT, personal communication, February 21, 2018).

## Customized Content

These four programs have elements of custom content requested by the teachers and or generated for the students. In Brooklyn, teachers are able to customize students' packets to include facsimiles of primary and secondary sources.

...[W]hat happens is you give the archivist your topic that you want to research, and then they give you a preview of what they have at their collections, what's in their archives and then basically they develop the packet for you. You give them comments... based on where your students are at and see if it matches the needs of your students. And the goals that you have for your students... I give them feedback on the packet, and they edit and revise it. (BT, personal communication, February 21, 2018)

Brooklyn Connections staff take pride in their ability to adapt materials and presentations on research skills to the needs of each participating class and recognize that the teachers likewise appreciate what the visiting instructors add to the classroom.

...[T]hey don't see us as being mere visitors, they see us as being co-educators. And that also stems off from our adaptability... even though we have kind of these set lessons and these set topics that we offer to the teachers to choose from, that doesn't mean that we don't adapt every lesson that we personally give in the classroom to that specific class and grade. So we can work with self-contained classes which are like 12 to 1 ratio, you know, special needs students. And we can work with English language learner students. (BL, personal communication, January 24, 2018)

In Indiana, IT requested additional content to be used as an advance organizer. "I asked if they would make little videos to introduce specific topics or skills and then we could use those videos in the lesson as the hook or the jump starter or building a common foundation of knowledge" (IT, personal communication, January 17, 2018). IL is a librarian in Indiana who during the 2012-2013 school year helped host visits to the State Library over four days by 330 seventh graders on a field trip to look at newspapers from their birth year.

We did one [instructional video]... on the microfilm readers and the specific reason that we did those was so that when they got here we were hoping the learning curve wouldn't be quite as steep... this was really a special thing. Especially cause we did so much prep work ahead of time, you know, cause there were the videos, [and] the ask-a-librarian.” (IL, personal communication, February 7, 2018)

### **New Tasks and Flexibility**

Two of the interviewees reflected on the significance of the new tasks that came with the requirements of their programs. In Indiana, IL recognized the scope of the work undertaken to bring a new set of visitors to the state library. “Our staff here are professional librarians and professional researchers, and genealogists... But they're just not used to working with kids... I think it was also great for our staff to kind of just be pushed outside their comfort zone” (IL, personal communication, February 7, 2018). MT saw the need for flexibility with his own workload which increased with the need to review and place all website content, and days when community partners were unavailable and plans for student groups would need to be rearranged.

Now with all of this, myself, [ML], and the school librarian... we have to review everything that the kids are doing, we have to guide them through it. We have to make sure that all of the protocols are being met and information is being entered onto the website... Another thing, be flexible!... [Y]ou're dealing with community volunteers, you know there might be a day that you know, one of 'em can't make it” (MT, personal communication, February 3, 2018).

### **Relationships for Partnerships**

Interviewees from three of the four programs commented on the need to pay attention to cultivating relationships which could support fruitful partnerships. In Brooklyn, BL recognized the value of serving as a connector.

...[J]ust really making an effort like I said to be the intermediary between archives and libraries and teachers like really making sure... you get to know the school system, you get to know the needs, the teachers and students, and you can



kind of speak their language... that'll help significantly. (BL, personal communication, January 24, 2018)

In Indiana, IT generated relationships where there previously had been none.

And that's when we realized... we've got a community resource... So we... went down to the State Library, and some of them had never been there before... And met with the state librarians, which was a first for them as well... Many of them had never met with a classroom teacher face to face to talk and plan things out. (IT, personal communication, January 17, 2018)

These relationships had lasting benefits as IL mused about the value of having collaborated for the first time with local eighth graders and their teachers.

...[I]t really helped us develop a great relationship with [IT, the school media specialist]. And through that.. I mean the teacher that's coming... next month, it's quite possible that she's coming because of a connection that [IT] had with her. (IL, personal communication, February 7, 2018)

The Maine librarian's familiarity with potential primary sources from his prior positions and his continued relationships with librarians were also significant for the program's success and sustainability from 2009-2010 to the current 2017-2018 school year.

Like I said I worked at their [university] library for 9 years. I know what their collection is. I know the head of their department. And he's still there. You know there's a very good, a close relationship. I can get on the phone and say I need, in fact I still do that. (ML, personal communication, January 17, 2018)

MT also noted his role in training a new school librarian as well as maintaining contact with the public library whose local history special collections ML would continue to use as a source of content.

I have had to go maintain that relationship with the... public library so that they're allowing, so that they're willing to let [ML] bring in resources to work with the kids. Even though he's not officially working there anymore... So you have got to be a good diplomat... And even if curveballs get thrown at you don't get frustrated, and don't burn bridges. (MT, personal communication, February 3, 2018).

### **Proficiency Working with Middle School Students**

Two interviewees cited their comfort level, proficiency, and preference for working with adolescents. "... And some people don't like seventh graders but I've gotten so I really enjoy them. Once you can harness their energy, it really makes a difference and they learn something..." (ML, personal communication, January 17, 2018).

...I really like figuring out ways to translate scholarship for a more general audience. And then with the middle school there's, I want to say, I've always liked older kids. I think middle schoolers are hilarious. I have one. They're kind of a pain ... but, so, it's a good fit when I'm asked to do programs, they quite often ask me to do those. (NL, personal communication, January 17, 2018)

Another commented on his awareness of how significant the changes adolescents experience are.

I like the challenge of it, because... middle school kids, it's true every piece of research will show you, these kids are truly in the middle between childhood and teenager-hood. And there's a zillion changes... They're developing socially, physically, and all of that and they are very focused, [so there's a] little bit of a flatline couple of years, 7th, 8th grade, in academic engagement... because now it's all about developing friendships and my activities... (MT, personal communication, February 3, 2018)

For these three interviewees, understanding the age group and their needs and abilities was also part of the success of the programs.

IL noted how a past lack of comfort level continued to be remembered at the Indiana State Library and how she had also addressed it in a professional development session for staff members.

...[J]ust the other day, I was talking to someone and they were like... when the Perry Meridian kids came, yeah that was crazy. And I was like, was it crazy, I don't think it really was? ... [S]o some staff members still have this impression that it was like this wild ride that we all went on together, when really they came like four different times and by the end it was a well-oiled machine... We have fourth grade field trips that come through here regularly. And to get ready for that I did a presentation with our staff, called like, 'What's scarier than a fourth grader?' And I talked about like tarantulas, or like flat tires... [L]ike, it's really

going to be OK people. These are just folks... (IL, personal communication, February 7, 2018)

### **Value as Unique Experiences**

Four interviewees also reflected on the unique value of the programs. One librarian mused that giving middle school students the opportunity to see the results of their work online is a reason the program is gratifying for the students. “I think it's what draws them in, gets them into doing it because you know after it's done, they can actually go to it, you know. And years from now. And see some of the work they did” (ML, personal communication, January 17, 2018). The value of learning local history was cited by one of the teachers: “And sometimes you're being pushed to learn so much other information, that it's really important for you to find out about the community that you reside in” (BT, personal communication, February 17, 2018).

The value of the program as an experience or resource that otherwise would not be available for students was specified by both a librarian and a teacher. The absence of field trip funding was implied as part of the cause in New York.

...[A]nother reason why we [*Brooklyn Connections*] tend to go to schools so much is because we recognize that underserved schools don't have the capabilities to come to us. So it really makes the program much more accessible to students who already are lacking resources to learn these skills. (BL, personal communication, January 24, 2018)

In North Carolina, the lack of opportunity for a majority of a school's students was also cited.

...[U]nless we as a school, and as teachers are giving them those opportunities, and we try to as much as we can, to either bring people in or take them places, to give them opportunities to kind of get out of just this school and just this neighborhood and see what else is out there- but for a lot of our students if we don't do that nobody is. (NT, personal communication, February 6, 2018)

### **Critical Thinking and Inquiry-Based Learning**

Students' critical thinking skills were specified by two interviewees in examples of photo analysis. In Maine, the librarian noticed when students explained why a car's owner was incorrectly identified.

... [A]nd there was a photo that was labeled you know Al Brady's car, this student was looking at it and said that's not Al Brady's car. That's not a, whatever it was, I forget the make and model of the car. 'That's not that make and model of the car.' And the kids could identify, you know, the '30's, and notice the photo was wrong. (ML, January 17, 2018)

In New York, the students used what they had learned about the progression of modes of transportation to correctly order a sequence of photos showing modes of transportation from different years.

So we had to sequence the pictures according to what we knew about the history of transportation. And that was a lot of fun. Cause you have to really use a keen acumen to do that. And they were able to do it. Based on even elevation of the subway platform. Wasn't that we went from a train to you know from a bus to a train, an omnibus, so they were able to actually do that, knowing the history of transportation, and studying it. (BT, personal communication, February 21, 2018).

Teachers in Maine and North Carolina also noted instances of student-led inquiry or the teachers encouraging inquiry as a method for organizing research. NT observed throughout the meetings for Wilmington students that "it was just that natural process of 'I don't understand this, I don't know what this means, I don't know who this is and now I've got to find out so that I can understand'" (NT, personal communication, February 6, 2018). MT explained that "we also work with kids to develop, to help them guide their research to develop key essential questions that they would want to know" (MT, personal communication, February 3, 2018).

## **VI. DISCUSSION AND IMPLICATIONS**

For all four programs, facilitators were influenced by external circumstances to make possible the use of primary sources. The impetus to bring new audiences to historical resources via the staff responsible for caring for them was a factor in the origin of each of these four programs. In Maine, a historical society looked for crowd-sourced help to digitize primary sources. In Indiana, teachers approached a historical society and library for help with providing needed specialized content and expertise. In New York, a public librarian head of special collections with a renovated reading room grant-funded a project to provide outreach so librarians could bring resources to teachers. In North Carolina, a teacher and a community group wanted middle school students to recognize their own school's and city's history, and a university faculty member joined them with a project idea that could help accomplish the goal.

In all four programs, curriculum requirements meant there was a teacher need which the opportunity to work with primary sources would meet. Teachers in New York, Maine, and North Carolina also chose these programs where students could work repeatedly with special collections staff and primary sources to help spark their interest and investment in local history.

Funding can also play a significant role in how programs are initiated and sustained or not. Two of the collaborations, from the Maine Historical Society and the Brooklyn Public Library, were brought to teachers to solicit their participation. Both had funding in place to cover their staff providing assistance to participating teachers. In Brooklyn, librarians made the trips to schools so that a lack of field trip funding would not prevent students from being able to learn from both primary sources and the librarians

working with the BPL's Brooklyn Collection. Funding was a barrier to continuing the portion of the program where students took a field trip to examine the primary source of a microfilm of a newspaper at the State Library in Indiana, due to limited field trip transportation. However, the program continues using alternate online activities to connect students with the state librarians.

In Brooklyn, the largest area for a program in this study, two successful grants helped establish program staff dedicated to school outreach. A grant writer was able to complete funding requests, which helped establish a large school outreach program. Outside funding sources were significant and are an important consideration for generating programs that can last for multiple years.

Logistics such as coordinating schedules or space to meet continue to be a factor that can complicate or block collaborations. Two programs enabled librarians to visit schools in Bangor and Brooklyn, and two projects brought students to primary resources in Wilmington and Indianapolis. Significantly, the North Carolina students were in walking distance of the museum where they met but a lack of funding for transportation curtailed the Indiana students' opportunity to receive one on one help in person. The sizes of these two groups were significantly different and the student group small enough to carpool to UNC to meet the university staff who would digitize the 1898 newspaper.

In Maine, the initial purpose of helping the Maine Historical Society digitize resources determined the timeline of tasks and forced facilitators to locate different potential primary sources each year to produce new digitized content. The public librarian's deep knowledge of university and public library collections, his comfort in establishing relationships with school administrators and his comfort teaching in the

classroom benefitted the Maine program. His expertise and familiarity based on his professional history is an ideal combination and helps shorten the length of time needed to locate resources. Likewise he is able to fulfill the 2001 admonition of Robyns for archivists to “join with faculty as partners” and “move... toward greater instruction in critical interpretation and analysis of that information...” (p. 365)

In Indiana, the school media specialist’s vision of a potential community partnership grew from teacher ideas to expand the timeline for a required research project curriculum. While the students worked on other components of the research project multiple times, the field trip to the state library to view newspaper microfilms was in fact a one-time activity. In subsequent years, the results of that initial collaboration were able to continue being used in the forms of videos on family stories including ‘What Does Genealogy Tell Me?’ This indicates a long lasting value from an initial investment of staff time at the library as one potential benefit of collaborating. The videos are also available on the library’s YouTube channel, thus establishing introductory content for all who are interested.

In each of the four programs, special collections staff and or teachers followed the practice that research indicates works best, i.e., providing or having students choose primary sources that were personally meaningful and appealing as recommended by Tally and Goldenberg and Gilliland-Swetland et al. The ability of special collections staff to customize content to meet each group of students’ need for customization to remain personally compelling also points to a greater amount of freedom for programs using primary sources that are designed as partnerships, to follow the needs of the students.

Complementary goals on either side of a partnership were also significant.

Cultural heritage institutions need help with digitization and or want to reach middle school and high school teachers and students. Teachers need assistance locating useful primary sources to meet curriculum goals.

This paper sampled only projects that made use of special collections at libraries, or in one case, a museum collection. This may be an indicator that archives are not yet positioned to offer recurring, extended school outreach programs and that non-university libraries and museums may be better located to deliver this content, with their specifically local collections.

BL also spoke of their program's role to advocate for other archives to establish similar partnerships with schools, and of the workshops they have given at archivists' national or regional annual meetings. This indicates that training resources are still emerging and that it is still the case as Carini wrote in 2009 "that archivists need training and strategies to address almost aspect of their roles as members of the educational team within secondary and higher education" (p. 47).

The need continues for studies of middle school and high school collaborations where customized content is provided and students use primary sources for research. Studies of undergraduate collaborations happen more frequently thanks to the co-location of faculty and researchers. Studies tend to examine individual aspects of such collaborations such as skills being taught including teaching with primary sources, historical reasoning, and or critical thinking, but examining the collaboration as a whole will help potential partners to assess if they can and wish to proceed with trying collaborations. Studies that can focus on secondary school collaborations are also needed



to help analyze professional guidelines for archivists according to the perspective of teachers of grades 6-12 and provide further evidence for how their needs do and or do not match those of university faculty.

The lack of comfort expressed by some state library staff in the past five years suggests some continuity of the absence of K-12 students as potential archival users as cited in the 1997 Gilliland-Swetland survey of Los Angeles archival repositories. Efforts to organize workshops or other training opportunities such as those provided by *Brooklyn Connections* to discuss school outreach will help continue to recognize middle and high school students and teachers as part of the K-12 audience who can and should also be connected to primary sources.

### **Limitations**

Interviewing students and additional participants in the organization and delivery of these four programs would strengthen this analysis. Finding additional examples to increase the sample size could also strengthen a comparison of programs that meet multiple times for students to research using primary sources.

## **VII. CONCLUSION**

It takes the right combination of people who are interested in collaborating with each other to deliver successful programs that meet multiple times and provide primary sources for research by students grade 6-12. The commitment of special collaborations staff and their partnering teachers to taking on new work to try a new collaboration, their abilities to provide personally compelling content and instruction in and extended time to

practice both analysis and research skills, along with tasks that students can undertake and accomplish in the time they have, are all key factors in successful programs where students work with primary sources over multiple meetings. Further research is needed to assess critical factors in middle and high school collaborations.

## VIII. APPENDICES

### Appendix 1: Recruitment Follow Up and Consent Document

Dear (Participant): Thank you for your reply.

Could we speak by telephone on [date] at [time]?

Please confirm your telephone number where I can reach you at the time of the interview.

**Please review the following Information Sheet** and print and sign the permission below if you agree to participate.

Please email a copy of the signed permission to [bethmw@live.unc.edu](mailto:bethmw@live.unc.edu) by one week prior to [date] and [time]. Please let me know if I can provide any additional information.

#### **Consent to Participate in Interview and for Interview to Be Audio-Recorded:**

I give permission for my interview to be audio-recorded and for the recording to be transcribed for the purposes of being analyzed for the research study, IRB Study #: 17-3214 Collaborative Educational Programs for Grades 6-12: A Study of Partnerships between Historical Collections Professionals and Educators.

I give my permission for the content of the interview to be used for this study.

I understand I will receive a copy of the transcribed interview via email.

Signed,

\_\_\_\_\_

(Name)

Phone Number: \_\_\_\_\_

**University of North Carolina at Chapel Hill Research Information Sheet****IRB Study #: 17-3214**

Collaborative Educational Programs for Grades 6-12: A Study of Partnerships between Historical Collections Professionals and Educators

**Principal Investigator:** Beth Morris Weiss

The purpose of this research study is to analyze what were effective practices of five collaborations between 2009 and 2017 for students in grades 6-12, and define how effectiveness could be measured. You are being asked to take part in a research study because you are a special collections librarian or school media specialist or museum staff who worked on or is working on programs with historical documents for students and you helped facilitate one of the educational programs being studied, or you are a teacher whose students participated in one of the educational programs being studied.

Being in a research study is completely voluntary. You can choose not to be in this research study. You can also say yes now and change your mind later.

If you agree to take part in this research, you will be asked to answer interview questions for approximately half an hour on the agreed upon date at the agreed upon time, using a video conferencing software if possible or a telephone conversation if not. Questions that form the basis of the research interview will be emailed to you along with permission for the interview to be audio-recorded no later than a week ahead of the interview. Other questions besides the questions provided ahead of time will be asked during the interview for the purpose of obtaining clarification and or further explanation.

Your participation in this study will take about half an hour excluding any time spent in preparation. Preparation for the interview is not required and completely optional. We expect that 9 people will take part in this research study.

The possible risks to you in taking part in this research are: having someone else find out that you were in a research study and a potential unintentional loss of confidentiality of data although required measures for data security will be followed.

The possible benefits to you for taking part in this research are: indirect benefit of providing research assistance to a student and helping advance conversation on practice of outreach and teaching with primary sources in the fields of library science and education.

To protect your identity as a research subject, the research data will not be stored with your name. In any publication about this research, your name or other private information will not be used.

If you have any questions about this research, please contact the Investigator named at the top of this form by calling 919-593-6997 or emailing [bethmw@live.unc.edu](mailto:bethmw@live.unc.edu). If you have questions or concerns about your rights as a research subject, you may contact the UNC Institutional Review Board at 919-966-3113 or by email to [IRB\\_subjects@unc.edu](mailto:IRB_subjects@unc.edu).

**Appendix 2: Baseline Interview Questions for Semi-Structured Interview**

How did you get interested in working with middle school students (or high school students)?

Describe this project to me.

When did it start?

How did you get involved?

What prompted you or a predecessor to start this collaboration?

What were the initial objectives of the project?

How did students interact with or how were they introduced to primary sources?

What were any specific objectives for the students after completion of the program?

How did you structure the program and why?

What was your interaction with the educator?

[or What was your interaction with the archivist/special collections librarian?]

What role did each of you play?

What was the division of tasks?

What were some of the challenges that came up?

Do you see it as successful?

How do you define its success?

How do you evaluate the program?

How were students assessed before and or after they completed the program?

What do you like about the program?

What would you change about the program?

What advice would you give to someone interested in a similar collaboration?

### Appendix 3: Desired Candidates at Time of Proposal

In Bangor, Maine, the Local History and Special Collections Librarian worked with middle school teachers and students on the Bangor Community Heritage Project as the students completed research to create online exhibits.

In Indianapolis, eighth grade students at one middle school researched their family histories after visiting the Indiana State Library and Indiana Historical Society during the 2012-2013 school year for “The R.O.A.D. I Travel” project.

In Wilmington, NC, a community coalition to establish a local history curriculum and subsequent discovery of a rare copy of the African American newspaper *The Wilmington Daily Record* brought together Cape Fear Museum staff with local professors who enlisted 8<sup>th</sup> graders from two schools to help transcribe the full issue over multiple meetings in the 2016-2017 school year.

In Brooklyn, the *Brooklyn Connections* program of the Brooklyn Public Library teams teachers and their students with coordinating librarians to advise throughout the school year on research projects.

In Birmingham, Alabama, the Birmingham Public Library and the Birmingham Civil Rights Institute paired as part of the Birmingham Cultural Alliance Partnership to complete an afterschool program at two middle schools on local and family history. Due to schedule conflicts, this program was not able to be included.

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